Project Proposal: South Carolina's Heritage Health Index

2. Narrative
Introduction

Clemson University (lead organization) and its partners,
- The South Carolina State Library
- The South Carolina State Archives (S.C. Dept. of Archives & History)
- The Confederation of South Carolina Local Historical Societies
  and
- The Palmetto Archives, Libraries, and Museums Council on Preservation (PALMCOP);

propose to conduct a statewide survey of cultural heritage institutions to measure the state of collections care and readiness for emergencies in South Carolina. The survey and resulting database will address key recommendations of the Heritage Health Index (HHI) including assessing and improving storage conditions for collections, strengthening statewide emergency preparedness and heightening visibility of cultural repositories.

The goal of the planning project proposed here is to create the infrastructure for comprehensive identification and ongoing assessment of collections care and emergency preparedness at South Carolina cultural heritage institutions. The planning project will focus on gathering and updating collections and contact information for all collections-holding cultural heritage institutions in South Carolina, developing a survey instrument and carrying out a survey similar to the Heritage Health Index and the NC ECHO Survey of Cultural Heritage Institutions, creating a database of all South Carolina repositories with corresponding photographs of the institution, and publishing a directory of institutions and collection strengths based on this database. Through the survey site visits, we will establish an informed base from which we can develop improved condition of collections, develop viable emergency plans, improve staff training and build stronger partnerships between identified cultural heritage agencies.

Grant partners were selected to provide appropriate representation of collecting institutions in South Carolina, as well as organizations that can assist in promoting the importance of preservation and collections care statewide and raise the visibility of collecting repositories. Partner organizations will provide membership lists, promote the projects to their constituents, and serve on an advisory committee. The advisory committee will provide input regarding the survey tool and help to identity as many as possible of the collecting cultural heritage organizations in the state of South Carolina, including archives, libraries, museums and historical societies. Advisory committee members will include State Archivist Roy Tryon, State Librarian David Goble, President of the Confederation of SC Local Historical Societies, Glen Inabinet, Dean of Libraries at Clemson University, Kay Wall, and Chair of PALMCOP, Alan Burns. Other advisory committee members will include museum and historic site representatives involved in PALMCOP as well as the South Carolina representatives to the Connecting to

Collections summit held in June of 2007. Project Manager, Emily Gore, represented the state of North Carolina at the summit, and will chair the advisory committee.

1. Need and Rationale
South Carolina needs a comprehensive view of collections care in the state. Only 32 collecting institutions in South Carolina completed the HHI survey. Data from these repositories, representing only a fraction of cultural heritage institutions in the state, cannot be considered comprehensive and may not be representative (a preponderance of the HHI respondents represent major or large institutions). This project will extract a limited number of questions from the HHI survey, add additional questions from the NC ECHO Survey of Cultural Heritage Institutions, and provide a more comprehensive look at collections care among the institutions. The survey will also contain specific questions about digital content.   A statewide digital preservation plan can begin to be established once we are aware of the content held at the state's repositories. The partners represent several major cultural heritage agencies as well as two membership organizations in the state, and this cross-representation will help in the identification of cultural heritage institutions and the development of the survey instrument. The survey will be conducted in person as a survey site visit to the cultural heritage institution. Conducting a survey like this in person yields better results as well as a much broader knowledge of the institution. A web survey would not be appropriate for all cultural heritage institutions because many do not have internet access or are run by individuals without the ability to fill out an online survey. It is often in the smallest of institutions where the least amount of resources exist that the largest treasures are found, and it is important that those institutions are included in this survey. The NC ECHO project has proven that the survey site visit is the most effective way to carry out a survey of this kind. States conducting online surveys only will not have the results that South Carolina will have as a result of choosing to conduct in-person survey site visits.

South Carolina needs improved disaster planning throughout the state. The HHI found that a vast majority of the collecting institutions do not have a disaster plan or staff trained to carry it out. This statistic is of particular concern in South Carolina, a state vulnerable to a host of potential disasters. South Carolina has suffered a direct hit from a major hurricane in the past decade, and has been struck by other major hurricanes in the recent past. South Carolina is subject to damage from tropical storms and depressions that can impact the entire state and produce tornadoes, heavy rainfall and flooding. South Carolina ranks in the top 25 states in relation to the number of tornados reported each year. Identifying and conducting a survey of institutions will help us begin to assess disaster preparedness in South Carolina. The survey will prepare us for the next round of funding where we will directly address disaster preparedness by insuring that every cultural heritage institution identified in the state has a documented disaster plan.

Institutional data provided by the various partners will be gathered and entered into a *Directory of Collections* database, which will become an online resource housed by the Clemson University Libraries. Such a listing does not currently exist in the State. The only known online

directory of SC Cultural Heritage institutions (available at
http://www.state.sc.us/scdah/repository/repositories.htm) is currently maintained by the
South Carolina State Historical Records Advisory Board (SC SHRAB) and the Confederation of SC
Local Historical Societies and at present, contains only 93 institutions. The Directory of
Collections database produced during this grant period will facilitate ongoing projects such as
training, networking, and preservation activities conducted statewide.

South Carolina needs to raise the visibility of collecting repositories.   South Carolina's
institutions are an underutilized resource in a state where tourism is a major industry.
Improved access to collections via the new Directory will encourage visits to historical
repositories by South Carolina residents and visitors to the state. Higher visibility will improve
collections care by increasing income to some repositories and by raising awareness—and,
thereby, support—among state and local officials of the value of these resources to South
Carolina communities.

2. The Planning Process

Activities funded by the grant will include:

**(1) Identify and centrally record information about all collections-holding institutions in the
state of South Carolina**, including, libraries, archives, museums, historical societies, historic
sites, and other collecting repositories. The development of this Directory is a major component
of the planning project. The Directory will contain information pertinent to all collections-
holding institutions in South Carolina.   The individual Directory entries will include elements
vital to emergency planning including contact information (phone numbers and email
addresses) that can be accessed in the event of an emergency. The listings will also include a
brief description of the important collections within each participating repository and
photographs of the repository to be taken on the survey site visits. Additional data elements to
be included (fields for public hours, collecting strengths, etc.) will be the result of discussion by
the representative Advisory Committee. We intend to add as many entries as time permits
during the planning phase. The Clemson University Libraries will maintain the database behind
the Directory. The data for the entries will come from the surveys.

**(2) Develop and test a survey instrument to assess collections care and emergency
preparedness for South Carolina repositories**. Questions believed to be most relevant to South
Carolina's repositories will be selected from the HHI, and additional questions will be selected
using the NC ECHO Survey of Cultural Heritage Institutions. Once the survey is developed, it will
be tested on a large representative sample (approximately 200 cultural heritage institutions) so
that, in the implementation phase, it can be used to eventually survey each cultural institution
statewide and produce a South Carolina version of the Heritage Health Index. A comprehensive
survey has been conducted by the NC ECHO Program in North Carolina, and that program took
almost 5 years to survey the entire state. Approximately 1,000 cultural heritage agencies were
identified and surveyed in that 5-year period (approximately 200/calendar year). Using this

estimate, South Carolina, a much smaller state geographically, should be able to develop the survey instrument, conduct 200 in-person surveys site visits and populate a database with the survey data.

When the planning phase is completed, **the goals of a long-term implementation project will be determined**. These will likely include: (1) complete the survey in every cultural institution statewide; (2) issue a South Carolina version of the Heritage Health Index; (3) market the Directory information to the state's tourism agencies to promote the importance of cultural resources in the state; (4) develop disaster plans for all cultural heritage agencies indentified; (5) explore the possibility of mapping the state's collections against existing emergency preparation and disaster mitigation resources using GIS technology, among others.

3. Project Resources and Budget
Clemson University is well positioned to take a leadership role in statewide preservation and emergency planning in South Carolina. The University employs eight professionals trained in archival management and/or digitization of archival materials.   Clemson archivists and digitization professionals consistently hold leadership positions in organizations throughout the state and the country. Emily Gore, Project Manager for this planning grant, currently serves as co-chair of ALA ALTCS-PARS Digital Preservation Interest Group and of the ALA LITA Digital Technologies Interest Group. Gore is also the former Project Manager for the NC ECHO Program, where she oversaw the completion of a statewide survey project very similar to the Heritage Health Index. This project identified, surveyed and visited over 90% of the cultural heritage organizations in North Carolina and will be used as a model for the South Carolina project. Alan Burns, Political Archivist at Clemson, currently serves as Chair of the Board of PALMCOP, a partner devoted to preservation in this planning grant.   Kay Wall, Dean of Libraries at Clemson, is well versed in preservation issues, having served as a consultant for the Mellon-funded SOLINET Academic Library Hurricane Recovery Project under the direction of Project Manager Brenda Banks.

The partners in this project represent archives, public and academic libraries, museums, historical societies, and historic sites of South Carolina, as well as organizations that can assist in promoting the importance of preservation and collections care and raise the visibility of collecting repositories. For additional information, see the included partnership statements.

Clemson University will manage the project, provide office space and computer equipment for the Project Archivist to be hired to conduct the survey, and will lead the advisory committee meetings.   Emily Gore, Head of Digital Initiatives and Information Technology for the Clemson University Libraries, will serve as the Project Manager, and will dedicate 10% of her time overseeing and reporting on this project. Gore, in consultation with advisory committee members will develop the survey instrument, and a full-time Project Archivist will be hired to carry out the survey and to input data gathered regarding cultural heritage institutions. All

grant funds being requested from IMLS will go to pay the salary of the Project Archivist. For budget details, see the Budget Forms and Narrative.

Clemson University is in the process of hiring a Digital Projects Programmer who will develop the survey database and use the XTF search tool for the directory of cultural institutions. The survey data will be structured in XML.   The Project Manager will coordinate and oversee the activities of the Project Archivist to be hired to conduct the survey, will oversee the work of the Digital Projects Programmer and will chair with the advisory committee.